



The 2020 OPS United Way Campaign

Business Process Guide

September 2020

Ontario 

 United Way

Your United Way of Kingston, Frontenac, Lennox & Addington:

| | | |
|---|---|---|
| OPS Code for KFL&A: ON20 | 417 Bagot Street Kingston, K7K 3C1 613-542-2674 www.unitedwaykfla.ca | Charitable Registration: 125978270 RR 0001 |
|---|---|---|

Key Dates

The 2020 campaign timelines have been set to ensure that: all fundraising is complete by mid-December; donations made through payroll deduction begin on the first pay date of 2021; and donors who qualify for a tax receipt receive it in a timely manner.

| DATE | EVENT |
|--------------|--|
| September 11 | United Way KFL&A Community Campaign Kick Off |
| October 1 | WIN opens for online payroll donations |
| October 8 | KFL&A OPS Sector Meeting |
| November 2 | OPS Province-Wide United Way Campaign Kick-off – VIRTUAL EVENT |
| November 9 | First COGNOS Charity Report available (weekly) |
| November 26 | United Way KFL&A Community Campaign Touch Down |
| December 10 | Last day to donate using @work and a paper pledge form |
| December 18 | Last day to donate through WIN |
| January 5 | Last COGNOS Charity Report |
| January 7 | First payroll deduction date |

New This Year

Going virtual, not viral

Given the unprecedented impact COVID-19 has had on the OPS in creating a need for social distancing at the office working virtually from home, this year's campaign will be run completely virtually. From all forms of communication, canvassing, planning and holding fundraising events, this year's campaign must go online to bridge physical gap between our colleagues, both in the office and those working from home.

COGNOS Reports

In past years, the weekly workplace fundraising reports were generated in WIN and sent by email to each ministry/agency campaign lead. This year, the reports will no longer be emailed and instead, authorized users will use COGNOS as an interface to read their reports in WIN. For workplaces that use WIN, the Employee Campaign Chair and Treasurers will need to sign WIN Security Access forms, to gain access to their weekly reports using COGNOS. For more information, please see the [COGNOS](#) section for details.

DM Chiarelli Blog

As the Executive Chair of this year's OPS United Way campaign, her leadership across the OPS will stretch across the province. Check out [her blog](#) and share some of her thoughts with your ministry and colleagues.

Celebrating 60 years!

The OPS and the United Way has reached its 60th year anniversary of fundraising and partnership! As the largest funder of social services in the province, the United Way and the OPS have partnered to weave a social safety network to empower and support those in our community who need it.

Leveraging successes from 2019

InsideOPS

The OPS United Way campaign has its [own page](#) on InsideOPS offers the most up-to-date news; information on how to donate; events; OPS campaign resources; United Way resources; and there is a section where regional campaigns can post their own news and information. Best of all, the site can be viewed by all OPS employees, so we will have access to the same information, at the same time. This site has a lot of room to grow so if there is anything you would like to see, please send your comments and ideas to Jonathan de la Cruz at jonathan.delacruz2@ontario.ca.

Automatic Pledge Renewal

To help streamline business processes, promote donor retention, and provide a great answer to the question, “why do I have to do this over again each year?” donors can now check a box to have their pledge donation continue in perpetuity. Using the online donation tool in WIN, donors can enter a donation amount and check the appropriate box to provide authorization to renew their pledge the following year. Their donation will renew until the donor chooses to modify or cancel it.

Recommended Campaign Timelines

Your workplace activities should roughly fall within the timeframe below, so your campaign operates within the overall OPS campaign structure.

SEPTEMBER

By now, the Employee Campaign Chair, Leadership Chair and Treasurer for your ministry or agency should be in place and training will be available in August and September. The ECC should request the name of the leads for each workplace campaign team within their organization. United Way KFL&A Community Campaign kicks-off virtually on September 11.

OCTOBER

All workplace campaign teams should be in place and planning campaign details including: setting a financial target; creating a schedule of virtual events and communications plan; assigning roles; planning a kick-off event; seeking donations of goods and services for auctions, early bird draws and pledge incentive prizes; appointing leads for online events; working with United Way to arrange for virtual speakers and virtual agency tours. United Way can provide campaign team training, so everyone understands the best practices for running a campaign and soliciting donations from colleagues.

NOVEMBER

The OPS United Way campaign officially begins on November 2 with a new virtual Kick-Off province-wide event 10:30am – 11am. During the first three weeks of this month, workplace campaigns should hold a kick-off event and focus on asking colleagues to give through a pledge donation (payroll deduction, credit card, cheque). It is important to focus on this at the start of the campaign because pledge donations are the easiest way to reach your campaign goal and help encourage repeat donors from year-to-year. If events are run prior to the pledge donation period, donors often feel they've already given.

LATE-NOVEMBER

United Way KFL&A Campaign Touches Down on November 26th. Ideally, your local team's efforts are able to align with this to ensure campaign totals are celebrated locally at the Touch Down.

DECEMBER

Paper pledge forms should be submitted by December 11, to allow time for processing. WIN closes for donations end of day December 18. All donations should be in by December 31 to ensure donors receive a tax receipt.

JANUARY

The final COGNOS report will be issued and will reflect all donations made in WIN including some last-minute donations made after your campaign closes.

OPS Strategic Goals

This year's campaign has four identified strategic goals:

1. Engage entire OPS, province-wide via virtual campaign

A virtual campaign addresses the challenge that the pandemic has caused with the varying work location situations of our staff. By running a completely virtual campaign, not only are addressing those that are working from home, but we level the playing field for all staff, regardless of where they are in the province. By engaging with every single person within the OPS, we increase the potential number of donors.

2. Mitigate loss of special event funds by encouraging employees to give via payroll or a one-time gift

Given the expected drop in funds from special events, special emphasis on pledging would be an effective counterbalance.

3. Increase Leadership giving

The Leadership Campaign focuses on giving at the Leadership level of \$1,200 annually – a campaign that sees the fewest number of donors who make the greatest impact, therefore provides the greatest return on investment. This year in KFL&A, a generous leader in the community will provide a Leadership Challenge Grant to encourage Leadership level gifts. By becoming a new Leadership donor, you increase the impact of your gift. Your first-time donation of \$1,200 or more to the United Way KFL&A will be matched up to a maximum amount. Increase your gift to \$1,200 this year and the Leadership Challenge Grant will match your \$1,200 donation. Full details: unitedwaykfla.ca/wp-content/uploads/2020/07/Leadership-Challenge-Grant-2020.pdf

4. Increase in pledge participation rate.

The pledge participation rate measure the number of staff that makes a pledge of any amount against the total number of staff. Despite the challenges this year holds, an increase in this rate would demonstrate an increase in participation of staff and the efficacy of the campaign, regardless of the total raised.

United Way as a Campaign Resource

United Way Offices in Ontario

“The United Way of Ontario” does not exist.

Rather, there are 39 United Way offices in Ontario that operate as separate incorporated charities; work independent from each other; and share the same mission and brand. Each United Way is responsible for supporting workplace campaigns in its own region and for ensuring donations are effectively invested according to local needs.

Your Local United Way

The OPS runs a province-wide campaign and it is important to note that funds raised by a local workplace campaign remain in the community to help fund local agencies – what is raised local, stays local. Each United Way offers tools and resources to help you build a strong campaign. Each regional office should identify a Local Campaign Lead to work with the local United Way and it is important to do so early in the campaign, to take full advantage of the United Way’s support.

United Way KFL&A Workplace Campaign Tools can be found here:

<https://www.unitedwaykfla.ca/get-involved/#workplace-campaign-tools>

United Way Charitable Registration Number

The charitable registration for United Way KFL&A: 125978270RR0001

Campaign Logos are available here: <https://www.unitedwaykfla.ca/local-love-and-corporate-logos/>

What is the Centralized Campaign Model?

Recalling that there are 27 United Way offices across Ontario, the OPS campaign has identified the United Way Greater Toronto as the “host” United Way to manage campaign communications, financial reporting and distribution of donations to all United Way offices in Ontario.

What are the Benefits to Local United Way Offices?

- ✓ Improved efficiencies since they are no longer required to spend time processing, collecting and receipting for paper pledges – it is all done centrally by the host United Way.
- ✓ Frees up time to work on improving and strengthening relationships with regional OPS workplace campaigns through improved local stewardship, volunteer training, improved awareness of local issues and concerns and enhanced opportunities through local community activities.
- ✓ A better understanding of the OPS campaign – consistent communications sent to local United Ways during the campaign helps to better steward their local volunteers and donors. Local United Ways will have a better understanding of our training approach and will be able to stay on message regardless of where they are in Ontario, when talking about the OPS campaign.
- ✓ Local autonomy remains with each office because they still provide local training to volunteers (based on the OPS training program), local community impact material, local tours, speakers, supports, services, recognition and local connections.

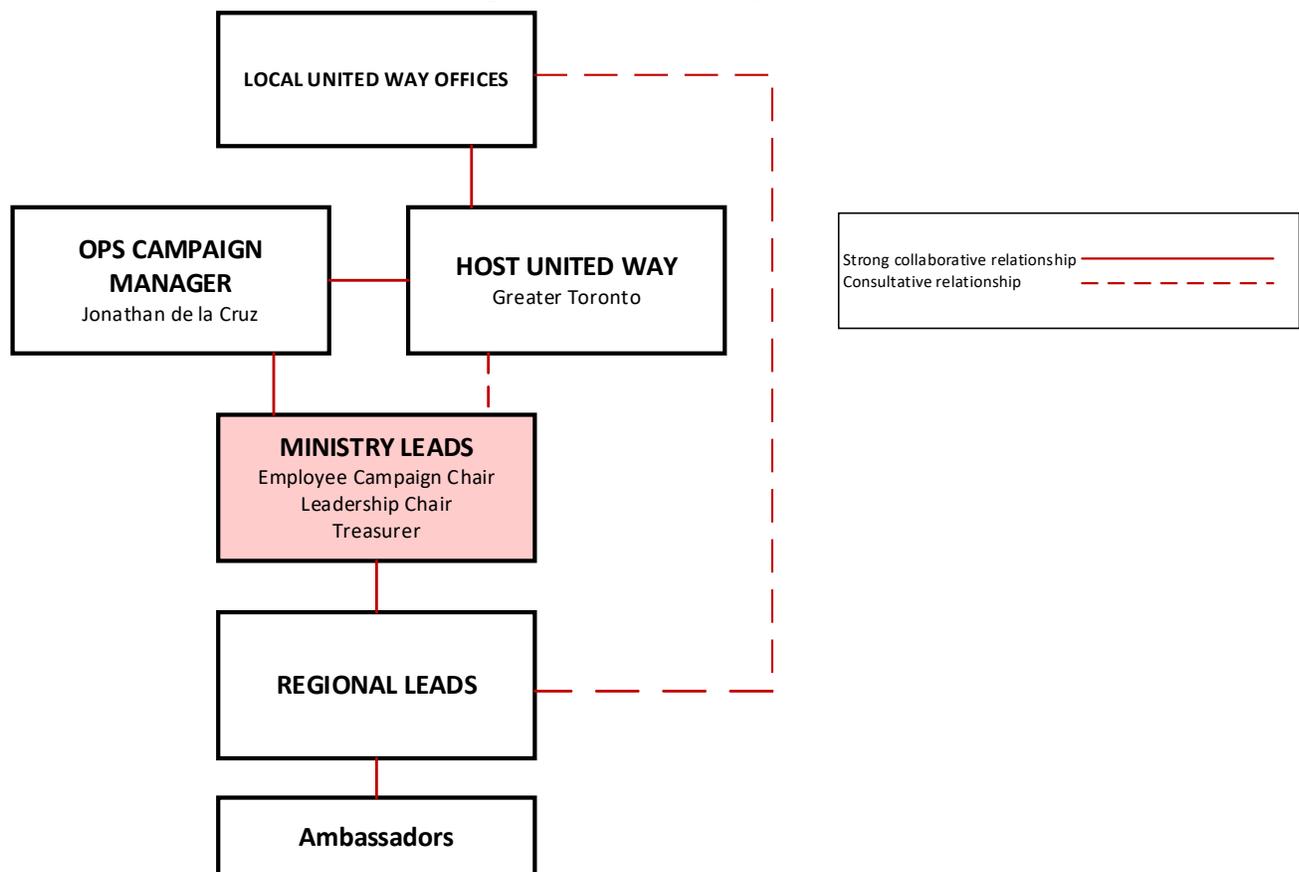
What are the Benefits to the OPS?

A centralized model means the administration of volunteer training, payroll and other pledge processing, receipting, PDF pledge forms, and communicating with all Ontario United Way offices about the OPS campaign and responding to their questions, is done through the host United Way. The model helps to create a stronger connection with United Way offices across Ontario and creates efficiencies and consistencies in the OPS campaign. The OPS also benefits by receiving accurate province-wide fundraising results and analysis to provide us with a better and more accurate understanding of our campaign.

CAMPAIGN VOLUNTEER STRUCTURE

Below is a diagram that describes the relationship between all volunteers.

Ministry leads include the Employee Campaign Chair, the Leadership Chair and the Treasurer. The committee may include a Communications Officer, Events Lead, Ambassador lead or any other roles that that are identified for the committee. Ambassadors represent their respective office and will look to the ministry leads (i.e. Employee Campaign Chair) for support, resources and training. They can also collaborate with Regional Leads, in any.



Checklist for Managing Your Regional Campaign

- Identify your regional leads (Local Campaign Lead)
- Ensure Local Campaign Leads understand the campaign reporting structure
- Ensure Local Campaign Leads are familiar with United Way tools and resources available through their local United Way office
- Share relevant email messages sent to ECCs from the Manager, OPS United Way Campaign with Local Campaign Leads
- Ensure Local Campaign Leads have contacted their local United Way office for support with regional materials and resources
- Ensure Local Campaign Leads communicate regularly with the ECC about their campaign progress and canvassing results

Recruiting Volunteers

Volunteers are the lifeblood of charity campaigns. They have direct access to a pool of potential donors and are the conduit for delivering important campaign information to staff. Highly engaged and self-motivated individuals can make huge difference to your bottom line. Finding these gems can be difficult and requires some strategic thinking. Consider all or some of the following options for recruiting a strong team:

- ☑ Think back to last year's campaign – do you recall anyone who stood out in terms of participating and engaging others?
- ☑ Publish internal articles that promote the benefits of volunteering, including: expanding your network, honing leadership skills, helping a cause, etc.
- ☑ Engage with past volunteers. Find and/or keep a roster of past volunteers and get to know them during the campaign so they feel a stronger connection to the campaign
- ☑ Do a ministry/agency wide ask-out
- ☑ Ask senior leaders to select individuals
- ☑ As a last resort, ask Executive Assistants to appoint a volunteer in their respective division.

Communicating with Regional Offices

Ministries/agencies with regional offices have unique challenges when it comes to organizing OPS charity campaigns because the regional offices can often feel disconnected from the rest of the organization. When planning your campaign, try to focus on virtual activities that are inclusive and appeal to all staff no matter where they are. Regular communication with your local campaign leads or volunteers through bi-weekly status calls or emails, helps to keep people engaged.

Local Campaign Leads will want to know how they are faring compared to other divisions within your organization. Consider ways to share real-time updates on campaign progress, such as Microsoft Teams, which allows individuals to update information into the same spreadsheet allowing volunteers to see how their division is doing compared to other divisions and how close they are to their fundraising target.

Engaging Volunteers

It is useful to understand what volunteers want to get out of the experience. A lot of the time, it has to do with expanding professional networks, meeting new people, contributing to a cause and organizing office events. Try to make the experience more engaging for them by:

- Booking a virtual United Way virtual agency tour
- Organizing a virtual meet and greet pizza lunch
- Conducting a brainstorming session

- Booking a United Way virtual speaker
- Creating an online communication forum where volunteers can share information and experiences.

Supporting Your Volunteers

Employees are giving their time to the campaign on top of their regular job duties. Their time is valuable so try to make their job as easy as possible by giving them supports. Provide enough campaign support material that can be stored on your organization's intranet page. Resources can include:

- “Event in a box” for instructions on running popular virtual fundraising events. United Way KFL&A offers a [Virtual Events Guide](#) to support these efforts
- [Email templates](#) (i.e., thank you messages, status update emails, etc.)
- In-kind donation request letter templates. United Way KFL&A can provide these
- [Visual material](#) (event posters, logos, etc.)
- Instructions for when to promote various events.

Volunteer Recognition

Volunteers don't expect anything in return for their contribution but finding ways to recognize them in a meaningful way throughout the campaign and afterwards not only shows an appreciation for what they've done – it also increases the chance of them becoming return volunteers. Here are some ways you can celebrate your volunteers:

- Ask volunteers to share stories and photos of branch events and showcase these in e-newsletters. Share these with United Way KFL&A to help promote your local support!
- Nominate volunteers through your organization's employee recognition program
- Send hand-written thank you letters to your volunteers
- Ask your Leadership Chair to personally reach out to volunteers who were highly engaged or delivered outstanding results
- Consider giving a small gift or certificate at the end of the campaign to each volunteer if your budget allows for it. United Way KFL&A has a materials catalogue you can order from: <https://www.unitedwaykfla.ca/wp-content/uploads/2020/09/2020-Materials-Catalogue-With-Pricing.pdf>

Engaging Senior Management – Help Them Help You!

Senior managers play an important role in supporting the campaign and volunteers. They need to be actively involved in fundraising efforts because their own level of engagement will trickle down and signal to volunteers and to staff, that the campaign matters.

As the project lead of your organization's campaign, brief your senior management team on your campaign plan in the month prior to launch. This is an opportunity to discuss what they should play and how they can help you. They will want to help, but they just need to know how.

Once you have recruited and trained your volunteers, encourage them to proactively reach out to their management team and involve them in branch events and play a role in fundraising initiatives.

You can also gain support at the management level through your Leadership Chair. The primary role of the Leadership Chair is to develop a plan and actively engage their senior colleagues to donate at the leadership level (\$1,200+), however, the Leadership Chair should also act as a champion for your campaign. Leverage their role by asking them to promote the campaign in their management meetings and educate managers about the role they can play in supporting volunteers. A lot of responsibility falls on senior leaders, so it makes sense to share some of that responsibility at the management level.

Another effective way of getting senior management engaged is through sharing branch level fundraising results midway through the campaign. It will provide them with a sense of where they stand in comparison to the rest of the ministry or organization and they will see if they need to ramp up efforts.

Communications – Choosing Key Messaging that Resonates

One of our key strategic goals this year is to increase the participation rate in pledge donations to build our donor base. The OPS has a natural connection to the communities in which we serve, and the needs of these communities resonate with our employees. Building on this connection, there is a need to change the mechanics of how we approach our campaign and move away from the transactional donation and focus on creating greater interest in the cause, connection to community and securing a deeper level of donor involvement by:

- Presenting compelling messaging that speaks to the preferences, attitudes, knowledge and experience shared by OPS employees
- Delivering focused messaging to demonstrate United Way's impact and how donor contributions are invested to support a strong and vibrant agency sector that offers people access to vital front-line services where and when they need it most

Payroll Deduction Using the Online Tool in WIN

- Donations can be made via payroll deduction in WIN starting on October 1, 2020 through to December 18, 2020
- Payroll deductions start on the January 7, 2021 pay date and the number of pays you select will determine when your payroll deductions will end
- Donors can request to have their payroll deduction renewed annually by selecting the Automatic Pledge Renewal box in WIN.

Automatic Pledge Renewal offers an easy and convenient way to make an ongoing donation to United Way, without interruption. By selecting this option, you will be enrolled in a "perpetual donation," meaning your donation will automatically renew in subsequent years, at the same amount and donated to the same United Way, until you make a change or decide to cancel.

- Payroll deduction can be cancelled or modified by contacting your OSS Contact Centre.

Why would I use this method of giving?

- ✓ The preferred method for donating is through the online tool in WIN as it removes the potential privacy risks associated with handling paper pledge donation forms with donor personal information
- ✓ The most private, secure and reliable way to donate
- ✓ You can choose how much you would like to donate per pay
- ✓ Donors can choose to enroll in Automatic Pledge Renewal
- ✓ Donors can choose to donate the full amount on one pay or spread it out over 26 pays
- ✓ You can view your donation amount deduction-to-date at any time
- ✓ Payroll donations will automatically be receipted on your T4 slip
- ✓ An online donation means you're supporting the OPS Green Initiative by reducing the use of paper pledge forms.

Situations where donations cannot be made using the online tool in WIN

- ✗ Donating by cheque or credit card
- ✗ Designating a donation to another registered charity in Canada
- ✗ Donating after the December 18, 2020 WIN cut-off date

How do I set up a payroll deduction using the online tool in WIN?

1. On the My Charity page in WIN, select the United Way.



2. On the United Way Deductions page, select “Add Deduction.”

Main Menu ▾

ORACLE

United Way Deductions

Twanna Amestst
Ontario Public Service

Notice of Collection - United Way Employee Donation

The personal information you provide to make a donation to the Ontario Public Service's United Way campaign will be used by Ontario Shared Services to administer your donation, including any applicable income tax deduction. In addition, your name and details about your donation will also be shared with the United Way.

For details of United Way's privacy policies and other information about the United Way, please contact your local United Way-Centraide (you can locate the local chapter of your United Way-Centraide at unitedway.ca).

For questions about online donations or the collection of your personal information by Ontario Shared Services, please contact OSS Contact Centre:

- * in the Toronto area: 416-326-9300
- * toll free: 1-866-979-9300
- * TTY: 416-327-3851 or 1-866-310-7259

Make your Donation

You can use this page to make a voluntary deduction from your paycheque that will support the OPS United Way campaign.

If you want to contribute to more than one United Way chapter, you must enter each selection separately. Select the Add Deduction button. After you have entered a deduction amount for the first United Way chapter you wish to donate to and saved your selection, you will be returned to this page and can repeat the steps to donate to another United Way chapter.

My United Way Deductions

| Deduction Type | Deduction Year | Deduction Per Pay | Total Amount | Amount Deducted |
|------------------|----------------|-------------------|--------------|-----------------|
| UW South Niagara | 2018 | \$50.00 | 1300.00 | 400.00 |
| UW Niagara | 2020 | \$40.00 | 1040.00 | 0.00 |

Add Deduction

Automatic Pledge Renewal - Modify or Cancel

Click 'Edit Deduction', below, to modify your Automatic Pledge Renewal deduction. Selecting this button will allow changes to be made to the deduction. To terminate your Automatic Pledge Renewal donation click Terminate Deduction. Modifications and terminations can only be made during the campaign period. Any changes you make will take effect on the first pay date of the next calendar year. Outside of the campaign period you may contact the OSS Contact Centre to modify your pledge.

My United Way Deductions Automatic Pledge Renewal

| Deduction Type | Deduction Begin Date | Updated on | Deduction End Date | Deduction Per Pay | Edit Deduction | Terminate Deduction |
|--------------------|----------------------|------------|--------------------|-------------------|----------------|---------------------|
| UW Greater Toronto | 2019/12/16 | 2019/05/17 | | 80.00 | Edit Deduction | Terminate Deduction |

- On the Add New Deductions page, enter the United Way chapter you would like to support in the United Way Chapter field. Enter the amount to be deducted per pay cheque.

The screenshot shows the Oracle 'Add New Deductions' page. The 'United Way Chapter' field is populated with 'UW Niagara Falls & Fort Erie'. The 'Enter Amount to be Deducted Per Paycheque' field contains '20'. The 'Number of Pays (between 1 and 26)' field contains '1' and is highlighted with a red box. A 'Message' dialog box is open, displaying a warning: 'Warning -- Automatic Pledge Renewal - Enrollment (29700.62)'. The message text reads: 'I agree to have my payroll deduction as described above, automatically renew on an ongoing basis. I will have the ability to cancel or modify my deduction through the My Charity page in WIN, during the next United Way campaign period or by contacting the OSS Contact Centre at any other time throughout the year. Deductions will begin in January of next year and will be recelpted on my T4 slip on an annual basis.' Below the message are 'OK' and 'Cancel' buttons.

- Enter the number of pays for which the deduction will apply. Press enter.
- If you would like your donation to automatically renew each year, select the Automatic Pledge Renewal authorization box. For more information, see Section 6 in this guide.
- If you donated \$1,200+ and would like to be recognized by your local United Way as a Leadership Donor, select the Leadership Donor authorization box. For more information, see Section 6 in this guide.
- If you donated \$1,200+ and would like your donation to support United Way Greater Toronto's Women United, select the Women United authorization box. For more information, see Section 6 in this guide.
- Click the "Submit" button.

B – United Way @work

This NEW online platform allows users without WIN access to pledge, as if they were pledging by the traditional online paper form in a much more streamlined process!

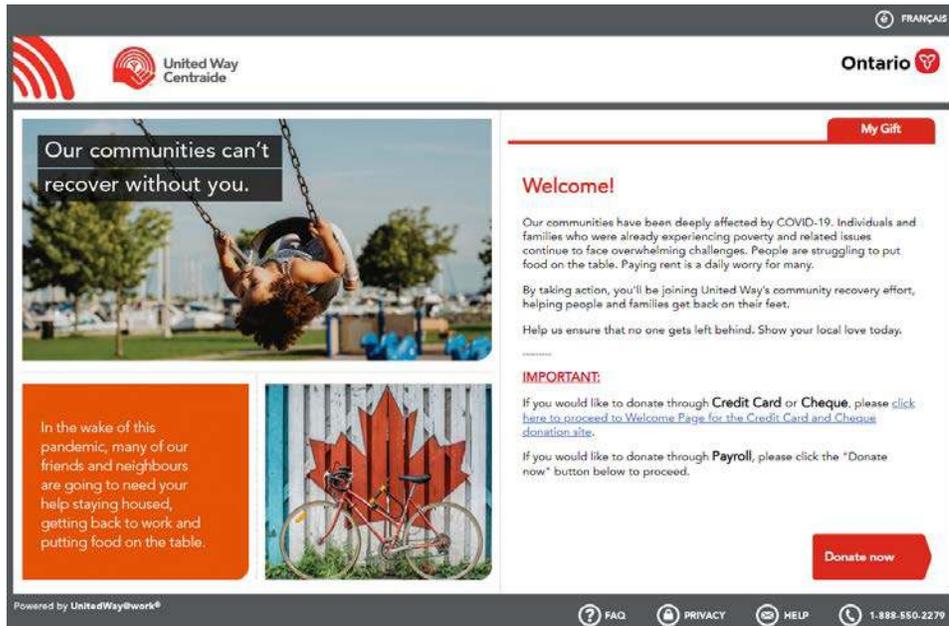
Why would I use this method of giving?

- ✓ Allows for pledging for credit card, cheque as well as payroll.
- ✓ Offers a streamlined processing without the worry of having to provide sensitive information via email.
- ✓ Staff without WIN access can still make their pledge online.
- ✓ Offers a colourful, interactive experience.
- ✓ Those with credit card loyalty programs are able to be rewarded if they choose to pledge with their credit card.
- ✓ Another private, secure and reliable way to donate
- ✓ Donors can designate their donation to any United Way in Ontario
- ✓ You can choose how much you would like to donate per pay
- ✓ Donors can choose to donate the full amount on one pay or spread it out over 26 pays
- ✓ Payroll donations will automatically be receipted on your T4 slip
- ✓ An online donation means you're supporting the OPS Green Initiative by reducing the use of paper pledge forms.

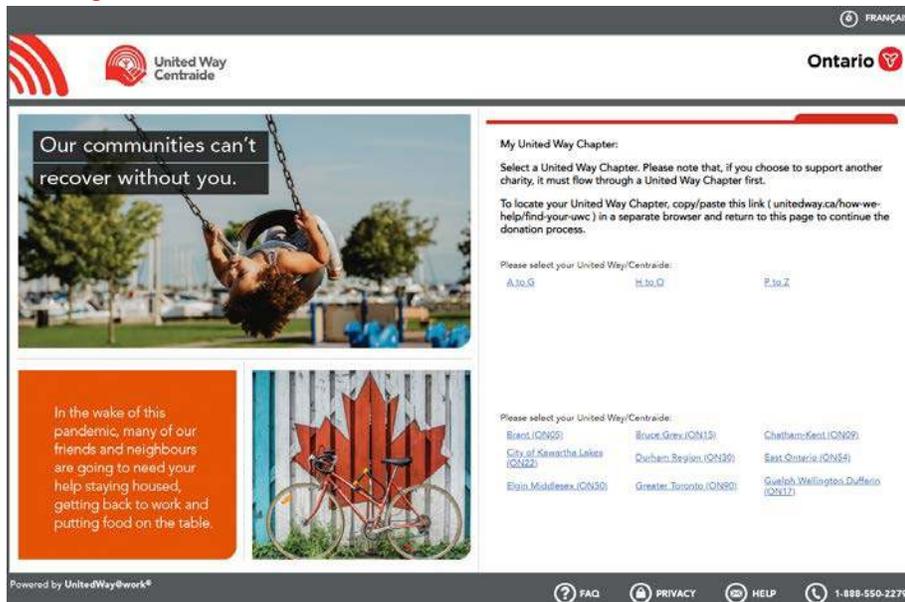
Situations when not @work is not recommended

- ✗ When adding an Automatic Pledge Renewal. This can only be added via WIN.

1. Once clicking the link and deciding whether to go through the English or French, path, determine the method of donation: payroll or non-payroll.

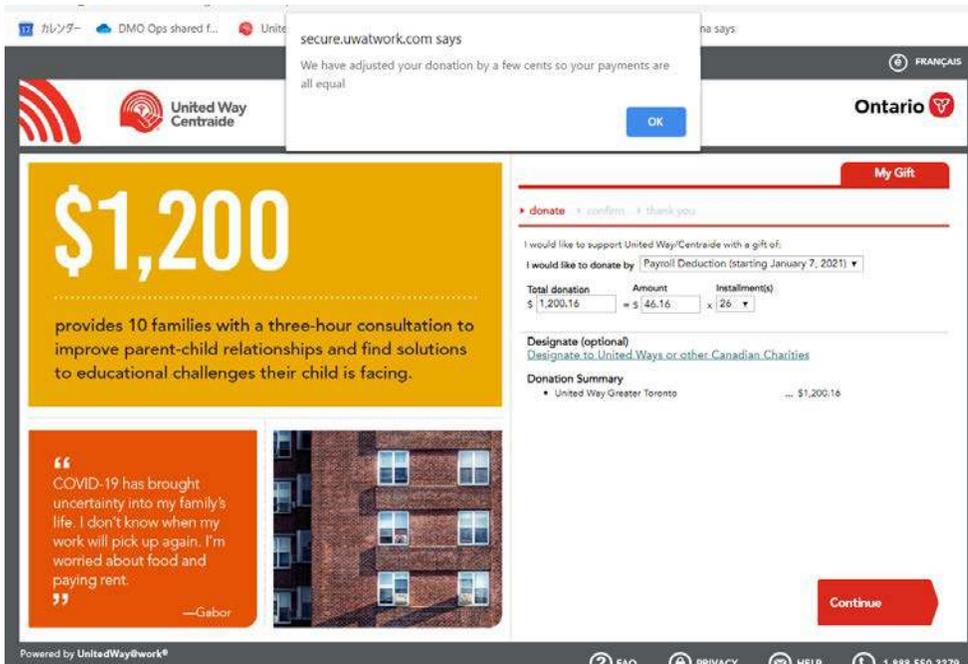


- 2a. To continue with a **PAYROLL** pledge, select the **DONATE NOW** button, and to **support locally**, select **United Way Kingston, Frontenac, Lennox, and Addington**

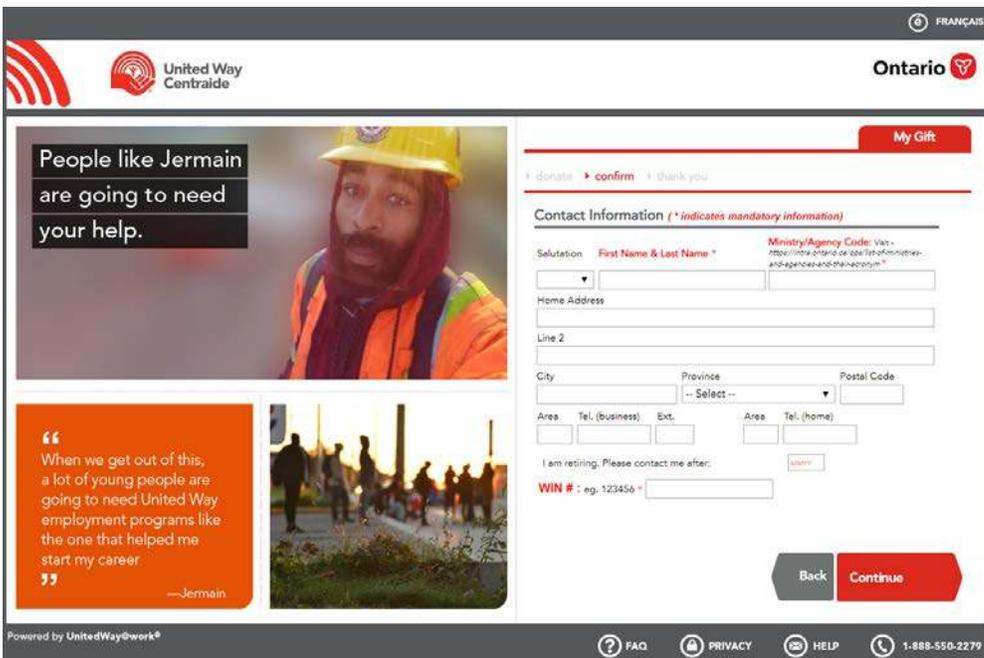


- 2b. Enter in the amount that you'd like to pledge per pay cheque. Note that if you enter the total amount, the website will auto calculate the amount per cheque, as per the

pop-up below.



- 2c. Enter all relevant donor information. Required fields: First and last name, ministry/agency code and WIN number. The ministry/agency code is the official acronym of your organization. If you need confirmation, please go to the URL available.



2d. Review the confirmation pop-up, answer the relevant questions and click SUBMIT.

Donor's First Name and Last Name Ministry/Agency Code

My Leadership gift may be publicly recognized by United Way-Centraide according to its recognition levels (where applicable).
My name will appear in print as

Donation Summary

Payroll Deduction (starting January 7, 2021)
- Payroll deduction pledges count toward our 2020 campaign. Deductions will be made throughout 2021 and will be indicated on your 2021 T4, which you will receive in early 2022 after all payments have been received.

| | |
|----------------------------|-------------------------|
| United Way Greater Toronto | \$1,200.16 |
| ($\$46.16 \times 26$) | Total \$1,200.16 |

Personal Communication Preference

E-mail (work)

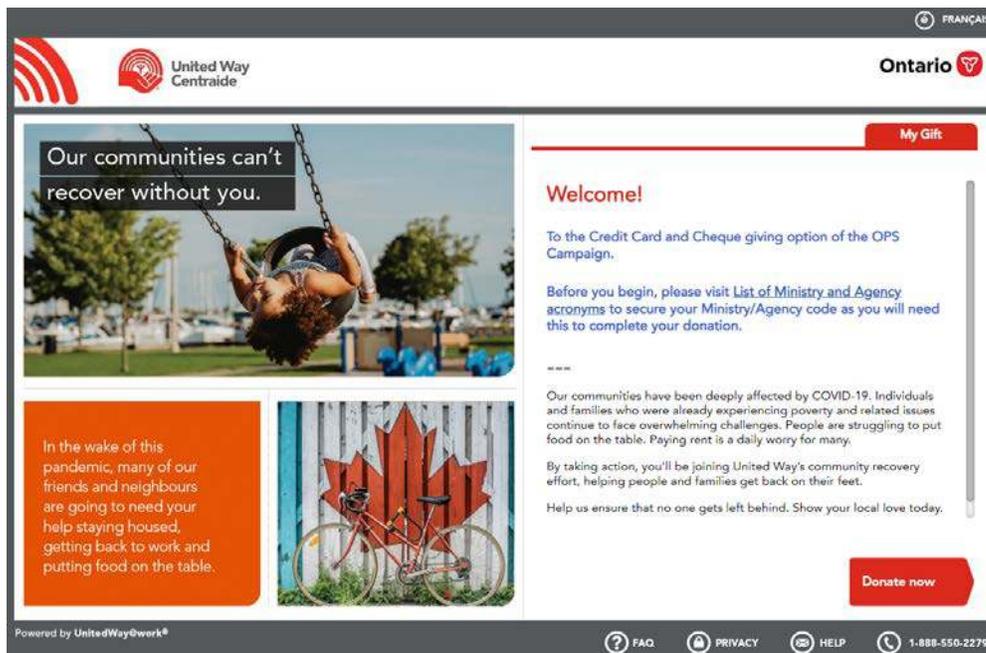
Personal E-mail

Sign up to receive information from United Way. You can unsubscribe at any time.
 Please send my confirmation email and eReceipt (if applicable) to my personal email.

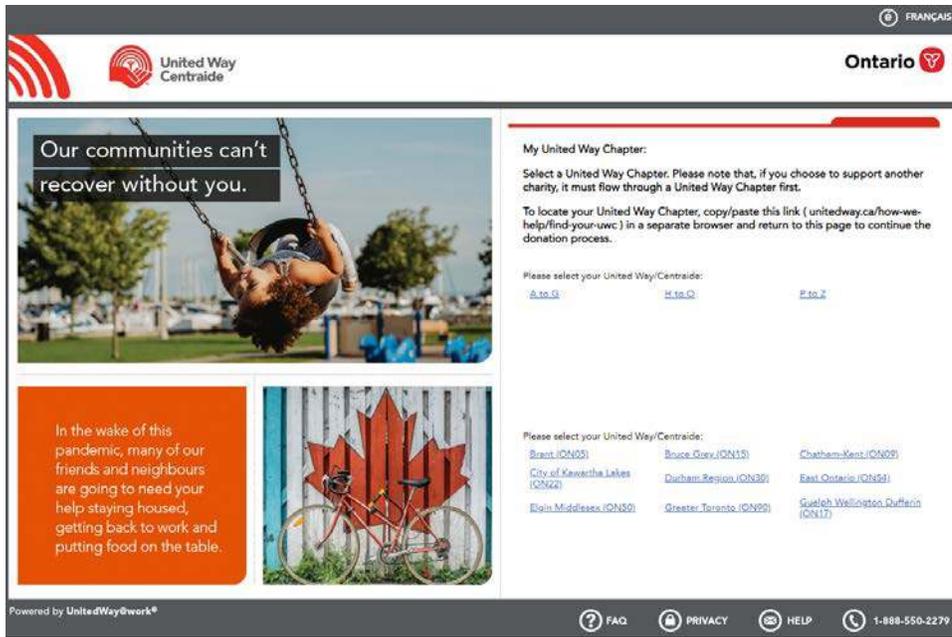
Submit

2e. Check your inbox for a confirmation email.

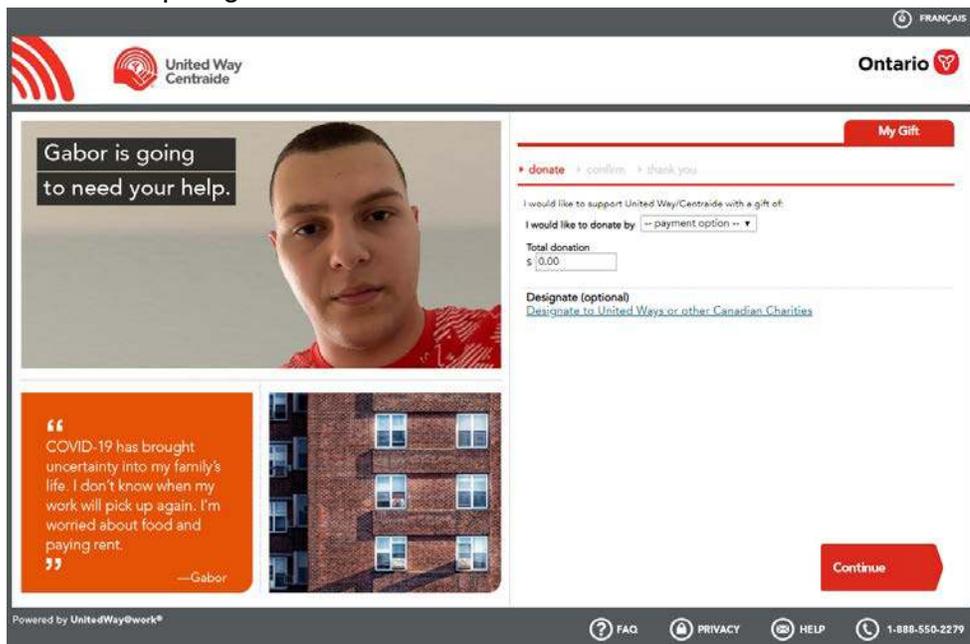
3a. If you wish to make **A CREDIT CARD OR CHEQUE PLEDGE** from the home page, click the appropriate link. You'll be taken to similar home page, as per below.



3b. To continue with a **CREDIT CARD OR CHEQUE** pledge, select the United Way Chapter that you'd like your funds to go to.



3c. From the drop down menu, select either **credit card** or **cheque**. Enter the amount to be pledged.



3d. Enter all relevant information. Note that the credit card details will not be asked for if the method of donation is cheque.

United Way Centraide Ontario

People like Jermain are going to need your help.

When we get out of this, a lot of young people are going to need United Way employment programs like the one that helped me start my career. —Jermain

Home Address *
Line 2
City * Province * Postal Code *
Area Tel. (business) Ext. Area Tel. (home)
I am retiring. Please contact me after: MMYY
Ministry/Agency Code eg. EDU. Please visit this link to secure your Ministry/Agency code - <https://intra.ontario.ca/ops/list-of-ministries-and-agencies-and-their-acronym> *
Credit Card
Credit Card Number
Expiry MM YY
CVV
Back Continue

Powered by UnitedWay@work®

FAQ PRIVACY HELP 1-888-550-2279

3e. Review all information in the pop-up, edit according and click on SUBMIT.

Testing Donor

x
x
x, ON. a1a1a1
Canada

My Leadership gift may be publicly recognized by United Way-Centraide according to its recognition levels (where applicable).
My name will appear in print as

Donation Summary
Cheque
- If giving by cheque, please visit this link for instructions - <https://intra.ontario.ca/ops/submitting-cheques>
United Way Greater Toronto \$1,200.00
(\$1,200.00 x 1) **Total \$1,200.00** Edit

Personal Communication Preference
E-mail (work)
Personal E-mail
 Sign up to receive information from United Way. You can unsubscribe at any time.
 Please send my confirmation email and eReceipt (if applicable) to my personal email.
Submit

3f. Check your inbox for a confirmation email.

Payroll Deduction Using the PDF Pledge Form

This option is ideally used only for donors without computers.

- Given that there are more transfers of information using a PDF pledge form, it is recommended that donors use WIN to make their pledge
- Donations can be made via payroll deduction using the paper pledge form starting on October 1, 2020 through to December 10, 2020
- Payroll deductions start on the January 7, 2021 pay date and the number of pays you select will determine when your payroll deductions will end
- If the maximum number of pays available (26) is selected, the last deduction date will be the last pay of 2021
- Payroll deductions must be renewed annually when using the paper pledge form.
- Payroll deduction can be cancelled or modified by contacting your OSS Contact Centre (Appendix B)

Why would I use this method of giving?

- ✓ For employees who do not have access to a computer or who have limited access, the paper pledge form is the most convenient way to give
- ✓ If you would like to designate your donation to another registered charity in Canada, using payroll deduction.

Situations where payroll deduction donations cannot be made using the paper pledge form

- ✗ Donating after the December 10, 2020 paper pledge form cut-off date.
- ✗ Signing up for Automatic Pledge Renewal.
- ✗ Donating via credit card. Due to security protocol, it is not safe to submit credit card information by email.

Where can I find a paper pledge form?

- The writeable pledge form is available in both English and French on the Inside OPS intranet site under “Make a Donation”
- All United Way offices in Ontario have the current writeable pledge form in both English and French, so if necessary, they can send it electronically or print and distribute locally.



- **Warning:** Do not accept and use any other donation forms that may be provided by local United Way offices. Section 4 of the form must be submitted to OSS – a section that WILL NOT EXIST on other forms.

How do I set up a payroll deduction using a paper pledge form?

- Complete the PDF pledge form ensuring all of the required fields (Sections 1-5 on the form) are complete. The form must be signed in Section 4.
- **Areas often forgotten:** the ONCode and the WIN number. These are critical pieces that must be completed.
- Submit the paper pledge form to the ambassador who will then forward it to the treasurer.

What is the Process for Completing and Submitting the PDF Pledge Form?

Donor:

1. Complete a paper pledge form ensuring all of the required fields are complete, including the ON Code.
2. Submit the PDF pledge form to the ambassador.

Ambassador:

1. Verifies PDF pledge form is completed correctly. If required information is missing, return to the donor to make corrections - do not make any changes or corrections on behalf of the donor.
2. Forwards the PDF pledge form to the ministry treasurers.

Treasurer

If you receive any PDF forms:

1. Track the amount in your ministry tracker and inputs aggregate results by ministry/agency on the Financial Tracking Summary Report.
2. Forward two copies of the PDF:
 - i. **To OSS.** See [appendix B](#) for appropriate email addresses; and
 - ii. **To the UWGT** via the EasySecure folder. Contact Randy Chafe at rchafe@uwgt.org to obtain the link and password.

Credit Card Donation Using the United Way Website

- Donations can also be made directly to your local United Way through their website.
- Donors should advise their workplace treasurer of their donation to ensure the amount is credited to the campaign fundraising total.
- If the website permits, the donor should include their ministry/agency name to ensure the amount is credited to the OPS campaign fundraising total.

Leadership Donor Recognition

United Way KFL&A has a Leadership recognition program for donors who give at the leadership level (\$1,200+), providing the donor provides authorization in writing to allow the United Way to publicly recognize them. Section 3 of the paper pledge form provides this opportunity.

Donors who give at the leadership level through WIN, can select a box to provide authorization to their local United Way to publicly recognize their leadership gift according to its recognition levels and if the United Way has such a program. The following statement appears in WIN and the donor must select the authorization box to be recognized:

By making a gift of \$1,200 or more, you may receive recognition and invitations to events from the United Way chapter you indicated above. If you would like to receive recognition, please provide your authorization to the statement below:

I authorize my selected United Way-Centraide chapter to publicly recognize my leadership gift of \$1,200 or more, according to its recognition levels and if such a recognition program exists.

Main Menu ▾

ORACLE

My Charities 

[Add New Deductions](#)

Jody Pulleytst

Ontario Public Service

*United Way Chapter: 

*Enter Amount to be Deducted Per Paycheque: (Click on magnifying glass)

Number of Pays (between 1 and 26): (Press Enter key)

Leave blank for Automatic Pledge Renewal

Goal Amount

Date of first Deduction on Paycheque: 2020/01/09

* Required Field

You have chosen to have a voluntary deduction to a charity taken from your paycheque. Please review the amounts above for accuracy.

Where a donation has been made to a registered charity other than a United Way Chapter, the United Way Chapter that is responsible for redirecting that donation is indicated above.

Leadership Giving

By making a gift of \$1,200 or more, you may receive recognition and invitations to events from the United Way chapter you indicated above. If you would like to receive recognition, please provide your authorization to the statement:

My Leadership gift (\$1,200 or more) may be publicly recognized by United Way.

Yes

No

Women United Designation

What is Women United KFL&A?

Women United Women United brings together like-minded women who want to use their skills, talents and resources to contribute to their community in a significant way and show their local love.

Women United builds on the strong legacy of Women in Leadership in our region.

Women United is an opportunity to:

- Network with women in the community who share interests and are passionate about helping people in need
- Mentor young women leaders as they launch their careers, sharing with them the opportunity to use philanthropy to impact issues that matter to them personally
- Know more about the difference being made in the lives of thousands of people right here – meeting immediate needs, and addressing root causes of issues like youth homelessness, food access, the impact of poverty on families and the issues facing women in our community
- Access special tours, events and volunteer opportunities exclusive to Women United members

Additional information available here: <https://www.unitedwaykfla.ca/womenunited/>

How to get involved: Women Leaders of the Way, those who donate \$1,200+ annually, individually or with a partner, are automatically part of United Way's Women United initiative and will be invited to events that occur throughout the year. If you are looking for other ways to give back or for more information about how you can be involved contact Bhavana Varma at bvarma@unitedwaykfla.ca

What Are the Membership Benefits?

The OPS is promoting, supporting and participating in Women United because this group does great work; it offers an excellent engagement and networking opportunity; and it also helps to promote the benefits of leadership giving. At this time, the current membership is primarily from the private sector, however, it is a cause that resonates with OPS employees, a number of which may be interesting in supporting it.

Automatic Pledge Renewal

What is Automatic Pledge Renewal?

The OPS United Way campaign continues to offer a feature called Automatic Pledge Renewal, for those who donate via payroll deduction using the online tool in WIN. Automatic Pledge Renewal offers an easy and convenient way to make an ongoing donation to United Way, without interruption. By selecting this option, you will be enrolled in a "perpetual donation," meaning your donation will automatically renew in subsequent years, at the same amount and donated to the same United Way, until you make a change or decide to cancel. Once a year, during the campaign period, donors will be able to modify or cancel their donation. Any changes made will take effect on the first pay date of the next calendar year.

What are the Benefits?

- Easy and convenient
- Encourages donor retention
- Pledge donations are renewed automatically each year, without interruption

How do I Enroll?

It's easy. Just make your donation through the online tool in WIN and select the pop-up box that provides your authorization to proceed with Automatic Pledge Renewal.

I agree to have my payroll deduction as described above, automatically renew on an ongoing basis. I will have the ability to cancel or modify my deduction through the My Charity page in WIN, during the next United Way campaign period or by contacting the OSS Contact Centre at any other time. Deductions will begin in January of next year and will be receipted on my T4 slip on an annual basis.

Yes

What if I Need to Modify or Cancel my Donation?

Once a year, during the campaign period, donors will be able to modify or cancel their donation. Any changes made will take effect on the first pay date of the next calendar year. Alternatively, donors can contact OSS Pay & Benefits for more information.

I request to modify or cancel my Automatic Pledge Renewal deduction. Selecting this box will allow changes to be made to the deduction fields above. To cancel my donation, I will delete the information from the deduction fields and select Submit at the bottom of this page.

Yes

Actual Cost of Donating

An individual who makes a donation to the United Way receives a federal tax credit against income taxes. The annual federal tax credit is equal to 15% of the first \$200 donated and 29% of the amount exceeding \$200. For more details on what the savings can be when combined with the reduction of provincial taxes, see the [charitable donation tax credit calculator](#).

| Donation Amount | Total Tax Savings | Actual Cost to Donor |
|---------------------------------------|--------------------------|-----------------------------|
| \$130 (\$5 per paycheck) | \$26.07 | \$103.93 |
| \$195 (\$7.50 per paycheck) | \$39.10 | \$155.90 |
| \$260 (\$10 per paycheck) | \$64.20 | \$195.80 |
| \$1200 (Leadership Pledge) | \$441.70 | \$758.30 |

FINANCIAL REPORTING PROCESS

Step-by-Step Process

This process may vary depending on the size of your organization and whether your ministry or agency has regional workplaces. Which ever way you choose to manage the financial reporting in your campaign, please note:

- Financial reporting must be done on a weekly basis
- Event dollars and a copy of the *Financial Summary Report* must be given to your local United Way office must not be held to the end of your campaign
- A completed PDF pledge form must be sent to your ministry/agency treasurer who will send them to the host United Way for processing. These forms **should not** go to a local United Way office.

1. Ambassadors

- Ambassadors canvass the workplace, encouraging their colleagues to donate on WIN or via @work.
- If a regional lead is designated, provide any PDF pledge forms and possible event cash to them. Otherwise, send directly to the ministry treasurer.

2. Regional Lead

- Ensures PDF pledge forms are completed correctly
- Receives all event dollars from the Ambassadors
- Creates a Financial Summary Report
- Gives event dollars to the local United Way office along with a copy of the *Financial Summary Report*
- Provides a copy of the Financial Summary report to the treasurer
- For PDF pledge forms where payroll deduction through WIN is requested, they are submitted to the treasurer once they are received. Please do not wait to submit them.

3. Ministry/Agency Treasurer

- Receives all reports, completed PDFs and possible event cash.
- **NOTE:** PDF pledge forms contain personal donor information and must be treated as confidential at all times. Treasurer must not share, copy or track paper pledge forms and/or the personal donor information contained on them.
- On a weekly basis, emails PDF pledge donation forms. To host United Way.
- Sends electronic transfer of event cash to host United Way with *Financial Summary Report*

- **NEW:** Pulls report via **COGNOS** on a weekly basis of the pledges made via WIN.
- **NEW:** Receives a weekly report from the OPS United Way Campaign Manager containing totals of credit card and cheque submission made through @work.
- Compiles all totals from reports and cash to complete the *Financial Summary Report* form to report on province-wide results
- On a weekly basis, sends overall *Financial Summary Report* to:
 - The Leadership Chair,
 - Employee Campaign Chair and
 - OPS United Way Campaign Manager

4. OSS Pay & Benefits

- Processes payroll donations and issues supporting reconciliation reports to host United Way using a secure method
- Prepares weekly ministry/agency charity financial reports in, available to authorized Employee Campaign Chairs, Leadership Chairs and Treasurers using COGNOS.

5. Host United Way (Greater Toronto Area)

- Receives all donations made through WIN and by cheque and credit card
- In 2021, distributes donations to United Way offices and other charitable organizations as specified by the donor
- Provides donor information to local United Way offices.

6. Local United Way Office (United Way KFL&A)

- Receives donations from host United Way and Financial Summary Reports
- Receives donor information from host United Way

7. Manager, OPS United Way Campaign

- Works with OSS Pay & Benefits, Employee Campaign Chairs, Leadership Chairs, Treasurers and United Ways
- Briefs Executive Chair on campaign progress and results.

8. Executive Chair

- Briefs the Deputy Minister's Committee and Secretary of the Cabinet on campaign progress and results.



Weekly COGNOS Charity Reports

- In past years, the weekly workplace fundraising reports were generated WIN and sent by email to each ministry/agency campaign lead.
- **New this year**, the reports will no longer be emailed and instead, authorized users will use COGNOS as an interface to access and read their reports in WIN.
- Access to Cognos:
 - All Employee Campaign Chairs and Treasurers who have been identified to the OPS Campaign Manager **before October 1** will be part of the mass approval form. No action is required.
 - Any additional Employee Campaign Chairs and Treasurers identified after October 1 must sign a [WIN Security Access form](#), to gain access to their weekly reports using COGNOS.
 - In section 3 of the form under comments add the following 'Access to the following role; COGNOS Charity-BU00XXX (enter [your Ministries Business Unit](#) in WIN here) e.g. BU00154 for Government and Consumer Services).
 - To ensure you maintain any existing WIN roles beyond your employee access or manager access, please ask your manager to reach out to their respective [HR Advisor](#) or [SBU contact](#) to be connected to the appropriate authorized requestor who will submit the form to WIN Security on your behalf.
 - Send an e-mail to jonathan.delacruz2@ontario.ca to ensure you are added to the mass list so that your access can be revoked at the end of the campaign.
- OSS Pay & Benefits will prepare a weekly fundraising report, available to authorized ECCs and Treasurers each Monday.
- The report contains three reports separated by worksheet:
 - Detailed Donations
 - By Department
 - Leadership Donations (donors who donated \$1,200+).
- These reports detail the donations made each week through payroll donation and are **cumulative**. In other words, only refer to the latest version of the reports to avoid double counting. Do not add the totals of two reports together.
- This information will help you complete the Financial Summary Report where you will also include the total donations made by cheque and credit card and funds raised through events.
- If a department has less than 10 employees, an aggregate of the donations will be shown, rather than the individual donations. This will have an impact on accurately reporting your ministry/agency's participation rate during the

campaign. The final participation number will be provided by United Way Greater Toronto at the end of the campaign.

- There will \$0 amounts in the goal amount column – this is a good thing! It is an indication that the donor used the Automatic Payment Renewal button. To calculate their total amount, simply multiply their donation amount by 26.

Financial Summary Report

On a weekly basis, ministry/agency treasurer reconciles payments received from regional workplaces, OSS reports via Cognos and @work reports from the OPS Campaign manager to compile one report to report on province-wide results.

OPS United Way Campaign Financial Summary Report



| | | |
|-------------------------------|--|------------------------|
| Date: | | |
| Ministry/Agency: | | |
| | | Overall Results |
| Employee Participation | Total Number of Employees in Ministry/Agency | |
| | Total Number of Workplace Volunteers* | |
| | Total Number of Pledge Donors** | |
| | Bike 4 United Way (# of participants) | |
| | GetUP 2020 or Similar (# of participants) | |
| | Workplace United Way Committee (# of participants) | |
| | United Way Day of Caring (# of participants) | |
| | Sponsored Employee Program (# of participants) | |
| | Other Significant Workplace Events (i.e., golf tournament, UPS Plane Pull, etc.) | |
| | OVERALL PLEDGE PARTICIPATION RATE (%) | #DIY#! |
| | OVERALL GIVING & VOLUNTEERING PARTICIPATION RATE (%) | #REF! |
| Pledge Donations | Payroll deduction - paper pledge form - leadership level (\$1,200+) | |
| | Payroll deduction - paper pledge form - non-leadership level | |
| | Payroll deduction - online donation - leadership level (\$1,200+) | |
| | Payroll deduction - online donation - non-leadership level | |
| | Credit Card donation - paper pledge form - leadership level (\$1,200+) | |
| | Credit Card donation - paper pledge form - non-leadership level | |
| | Cheque donation - paper pledge form - leadership level (\$1,200+) | |
| | Cheque donation - paper pledge form - non-leadership level | |
| | Other | |
| | PLEDGE DONATIONS TOTAL | \$0.00 |
| Dollars Raised Through Events | Ministry-led events | |
| | Bike 4 United Way | |
| | Gowfest (record 50% of amount raised)*** | |
| | GetUP 2020 | |
| Funds Submitted to local UW's | Total event dollars remitted province wide - cash/cheque | |
| | Total event dollars remitted province wide - e-funds transfer | |
| | EVENTS TOTAL | \$0.00 |
| | GRAND TOTAL | \$0.00 |
| Name/Title: | | |
| Email: | | Phone: |

*Total Number of workplace volunteers in your organization, province wide
 **Total Pledge Donors = number of financial donors who donated by pledge (i.e., not to an event)
 *** 50% of amount raised goes to the Ryan's Well Foundation

These weekly reports should be sent to the OPS Campaign Manager, the Leadership Chair and the Employee Campaign Chair.



How to Retrieve Your COGNOS reports

Your reports will be ready in early October and will be available to you until the end of the campaign. They are refreshed on a weekly basis with new numbers being available on Mondays unless there is a holiday. They will then be available on the Tuesday of that week. You can pull your reports throughout the week at any time.

The following video will walk you through how to retrieve your reports in COGNOS;

<https://intra.winreporting.win.gov.on.ca/ibmcognos/eiad/training/cognos-11.html>

You will have access to the following reports within your respective business unit;

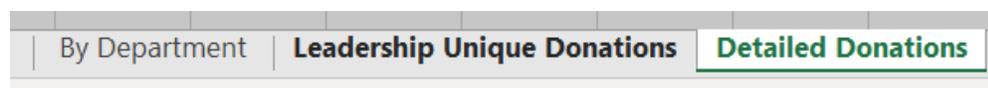
Ministry Chair\Treasurer Report - By Department - BU00XXX
 Ministry Chair\Treasurer Report - Leadership Unique Donations - BU00XXX
 Ministry Chair\Treasurer Report - Detailed Donations - BU00XXX

A link to access Cognos will be provided to all ECCs and Treasurers towards the launch of the campaign.

How to Read the Reports

For workplaces that use WIN, from November 9, you will have access to your first WIN report using COGNOS, that shows how much your organization has raised so far through payroll deduction. Chances are, it will be \$0 at this time. If you would like something to appear on the report to see how it looks, you may want to consider making your own donation starting on October 1, 2020. If your organization doesn't use WIN, please disregard this section.

To give you an idea of what the report looks like, note that there are three sheets, identified at the bottom left of the excel sheet:



The third sheet, "Detailed Donations" will contain each payroll pledge made by WIN and by @work.

Please note the following **columns headers of the OSS report from COGNOS:**

| Business Unit | Ministry | Deptid | Deptid Descr | Deduction Cd | Deduction Cd Descr | Last Update Date |
|---------------|------------------|--------|---------------|--------------|------------------------|--------------------------|
| 00100 | Name of Ministry | 010200 | Policy Branch | UW17 | UW Guelph & Wellington | 13-Oct-16 12:00:00 AM |

| Effdt | Deduction Amt | Goal Amt | Paper/Online | Location Id | Location Descr |
|--------------------------|---------------|----------|-------------------------------|-------------|-------------------------|
| 19-Dec-16 12:00:00 AM | 5 | 13 0 | Employee Self Service User | 254920 5 | Guelph 1 Stone Rd |

Business Unit – Each ministry is identified by a business unit number

Ministry – Name of ministry

Deptid – Department code within the ministry. If you wish to obtain drilled down information about the subtotals of branches and division, you can organize the information in this report by the corresponding department ID. **PRO TIP:** Ask your ministry HR branch for the latest version of your ministry’s department ID tree to help interpret these numbers.

Deptid Descr – Description of the department

Deduction Cd – The United Way chapter the donation is designated to

Deduction Cd Descr – Name of the United Way chapter

Last Update Date – Donation date

Effdt – First day of the pay period of the first deduction

Deduction Amt – Deduction amount per pay

Goal Amt – Total amount donated

Paper/Online – How the donation was made (either Employee Self Service User = WIN or Paper = @work) Credit card and cheque donations will not appear on this report - track separately

Location ID – Workplace building or building cluster where the donor is located

Location Descr – Building address where the donor is located.

Discrepancies in the Reports

You may notice from one week to the next that a donation has disappeared from your report. If a donor leaves your ministry, their donation will follow them to their new ministry. If a donor cancels their donation, it will disappear from the report.

If you notice that donations made by PDF pledge form are missing from your report, please contact OSS to confirm they received the forms you sent in.

Remember, the information is cumulative, meaning donations will be added each week, as they are made. Each weekly report does not represent a list of new donations.

Privacy of Donor Information

Protecting donor rights and privacy is a priority and commitment of both the United Way and the OPS. It is important that your campaign team adhere to the following fundraising and privacy practices when making solicitations on behalf of the United Way.

Privacy Best Practices Checklist

- Limit the number of people on your committee who deal with a donor's personal information.
- Ensure that committee members clearly understand the need to keep personal information confidential and limited to use only for the United Way campaign.
- Ensure that reporting donation results cannot identify the person who made the donation.
- Do not maintain list of donors for the current campaign year or to use in future years.
- If you find donor information on your office shared drive or in hard copy file folders from past campaigns, delete or destroy the information.
- In your capacity as a volunteer, donor information including WIN ID must not be accessed, copied, shared and/or released for purposes other than those specified in the OPS United Way Business Process Guide.
- Handle and protect donor information including WIN ID by using a secure work environment to ensure confidentiality is always maintained.
- Follow the instructions in the OPS United Way Business Process Guide to ensure you adhere to the procedures around protecting donor's personal information.

Volunteer Practices for Donor Solicitations

All individuals making solicitations on behalf of the United Way should adhere to the following practices:

- ☑ Disclose that they are volunteers soliciting behalf of the United Way.
- ☑ Make every effort to respect donors/prospective donors when making solicitations and honour their requests to receive print materials and limit or discontinue solicitations if requested.
- ☑ Ensure that fundraising solicitations made on behalf of the United Way are truthful and accurately describe the United Way's activities and intended use of funds.
- ☑ Act with fairness, integrity and in accordance with all applicable laws.
- ☑ Immediately disclose to the United Way any apparent or actual conflict of interest.
- ☑ When hosting a fundraising event in your workplace you must clearly indicated the amount of proceeds that will go to the United Way (e.g., 100% of funds raised from a bake sale will go to the United Way; 50% of the sale of Govfest tickets will go to the United Way (50% go to the Ryan's Well Foundation).

Photo and Video Waiver and Release

If your workplace campaign hosts an event where photographs or a video recording will be taken to use to promote the event in the future, the following photo and video waiver and release should be included on the event registration site, the back of an admission ticket or in the promotion of an event.

The short paragraph below with a link to the full photo and video waiver and release can be used and if the event has an electronic registration site, it is recommended that the participant actively accepts the terms below using a click-through acceptance button.

Short Paragraph:

Note: A photographer/videographer may be on site during this event and you may be photographed/ filmed for the purpose of promotional coverage of the event.

[View the OPS United Way campaign's full photo and video waiver and release.](#)

Full Photo and Video Waiver and Release:

In return for being permitted to participate in an OPS United Way event, I consent to the use of my name, image, voice and voice likeness, statements and biographical information, and the taking, use or publication of any photograph or video recording of me by or on behalf of the OPS United Way campaign organizers without compensation, notification, or further permission. I agree that Her Majesty the Queen in right of Ontario is the owner of any such photograph, video, audio, or video and audio recording.

I agree to forever waive any and all rights I may have in relation to the publication of my image in various contexts or the right to control the use or distribution of my image that I may have in or to the photograph or video recording.

I agree to release and discharge Her Majesty the Queen in right of Ontario, her ministers, agents, appointees and employees from any and all claims, expenses, demands, actions, causes of action and for any and all liability howsoever caused and by whomever caused, arising out of, but not limited to, the publication, reproduction, distribution, modification, collection, disclosure or any other use of the photograph or video recording.

Sample Event Waiver

If you are running a workplace event that requires a waiver, you may want to modify the waiver below for your use.

WAIVER, RELEASE AND INDEMNIFICATION

By registering to participate in the [event], to be held throughout the month of October 2019, I agree to waive and release Her Majesty the Queen in right of

Ontario, her ministers, agents, appointees and employees, United Way Greater Toronto, other regional United Way chapters and any other person or organization assisting in the [event] from any and all liability, including but not limited to any loss, damage or injury (including loss of life) howsoever occurring by reason of my participation in or travelling to and from the [event], and notwithstanding that the same loss, damage, injury or death may have been contributed to or caused by the negligence of any of the above-named parties. I also agree to indemnify and hold harmless Her Majesty the Queen in right of Ontario, her ministers, agents, appointees and employees, United Way Greater Toronto, other regional United Way chapters, and any other person or organization assisting in the [event] from and against any and all liability incurred by any or all of them arising as a result of, or in connection with my participation in the [event] for United Way.

I further state that I am in proper physical condition to participate in the [event] and am aware that participation could, in some circumstances, result in physical injury. I understand that, if I have any questions or concerns about my ability to participate in this event, I should contact my family physician.

By signing below, I agree to this waiver for the [event].

First Name: _____

Last Name: _____

Signature: _____

Guest of: [insert full name of registered participant]

Date: _____

Workplace Fundraising Virtual Events

Going Virtual

Given the challenges and the unpredictable state of how staff can interact in-person at the office while including colleagues who are working at home, it is integral that if your ministry plans to move forward with any fundraising events that they are held virtually. As a result everyone has the same access and processes are consistent.

Here are a few points to keep in mind when planning a virtual fundraising event:

- Establish your scope – ministry wide, division/region wide, branch wide?
- Determine your virtual meeting platform
- Choose a FUN activity and pull people in to help brainstorm
- Identify how folks can participate in the activity
- Identify how people can pay to participate (i.e. e-transfers, an additional pledge to WIN/@work)
- Communication broadly
- Pull a team together to help pull the event off
- Consult the [United Way KFL&A Virtual Events Guide](#)

Sample Donation Request Letter (Sponsorship)

October XX, 2020

ATTN: DONATIONS COMMITTEE

Address

RE: Donation Request – United Way

On November xx, 2020 the Ministry of xxx will hold our virtual event - xxxx in support of the United Way. Last year, our fundraising campaign exceeded our goal of \$xx,000 and raised over \$xx,000, thanks to the dedication of our fundraising volunteers, the generosity of our colleagues and contributions from our sponsors. Our goal this year is to raise \$xx,000.

I am writing to request your support through the donation of a gift card for our silent auction. Your contribution would be an important symbol of your commitment to help support and enrich the lives of individuals and families in city and in communities across Ontario.

In return for your generosity, your company logo, with a link to your website will appear on our internal website and event poster and your company will be recognized and thanked in our event wrap-up communications. I will also provide you with a thank you letter that states the value of your donation. Last year's event attracted over 200 employees and I'm certain that those who participate this year will appreciate your contribution and dedication to help support the United Way.

Thank you for your consideration of this request. If you have any questions or to arrange for pick-up of your donation, please contact me at email address or phone number.

Sincerely,

Sample Thank You Letter

December XX, 2020

Name and address

Dear name:

On behalf of the Ministry of xx and United Way, I would like to thank you for your generous donation of \$xx worth of gift certificates for our virtual fundraising event that took place on November xx, 2020.

I am pleased to let you know that thanks to the dedication of our fundraising volunteers, the generosity of our colleagues and contributions from our sponsors, this year the Ministry of xx raised over \$xx,000 for the United Way. Company name's contribution helped us to ensure the overall success of the event.

This silent auction was a wonderful example of businesses and individuals coming together to support and enrich the lives of individuals and families in our community. Thank you for your support and contribution to this fundraising event.

We hope that we can count on your continued support at next year's silent auction which will once again, make a meaningful difference to people in our community who rely on the services of United Way.

Sincerely,

APPENDIX

ONTARIO SHARED SERVICES PAY & BENEFITS OFFICES

Treasurers must send PDFs to their appropriate OSS contact below before December 10, 2020.

Ontario Shared Services Pay and Benefits Offices

Mail your completed and signed Change In Short Term Sickness Plan (STSP) Credit Sequence to the corresponding OSS Pay and Benefits address for your ministry/organization.

| Ministry/Organization | Mailing Address |
|--|--|
| Agriculture, Food and Rural Affairs Cabinet Office (Includes Intergovernmental Affairs) Children, Community and Social Services (Includes Women's Issues) Economic Development, Job Creation and Trade Finance Financial Services Commission Francophone Affairs Government and Consumer Services Health and Long-Term Care Infrastructure Lieutenant Governor Ministers Staff (All Ministries) Municipal Affairs and Housing Office of the Premier Ontario Clean Water Agency Ontario Financial Authority Ontario Heritage Trust Ontario Media Development Corporation Senior and Accessibility Senior Payroll (All Ministries) Training, Colleges and Universities Treasury Board Secretariat | Ontario Shared Services Payroll and Benefits Operations Branch o/o Macdonald Block Mail Facility 77 Wellesley St W, Box 500 Toronto ON M7A 1N3 Email: oss_payroll_qta@ontario.ca Fax: 416-212-2911 |
| Community Safety Education | Ontario Shared Services Payroll and Benefits Operations Branch 777 Memorial Ave Orillia ON L3V 7V3 Email: oss_payroll_orillia@ontario.ca Fax: 705-558-9980 |
| Attorney General Correctional Services Energy, Northern Development and Mines Labour Ontario Place Corporation Part-time Per Diem Appointees across OPS ministries and agencies | Ontario Shared Services Payroll and Benefits Operations Branch 200 First Ave W North Bay ON P1B 3B9 Email: oss_payroll_northbay@ontario.ca Fax: 705-494-3141 |
| Indigenous Affairs Environment, Conservation and Parks Natural Resources and Forestry Ontario Tourism Marketing Partnership Corporation Tourism, Culture and Sport Transportation | Ontario Shared Services Payroll and Benefits Operations Branch 189 Red River Rd, Suite 301 Thunder Bay ON P7B 1A2 Email: oss_payroll_thunderbay@ontario.ca Fax: 705-479-6451 |
| Ontario Science Centre (not serviced by Pay and Benefits Operation Branch) | Ontario Science Centre Human Resources 770 Don Mills Rd Toronto ON M3C 1T3 |
| St. Lawrence Parks Commission (not serviced by Pay and Benefits Operation Branch) | St. Lawrence Parks Commission Payroll Office 13740 County Rd 2, RR 1 Morrisburg ON K0C 1X0 |

(2019/03)